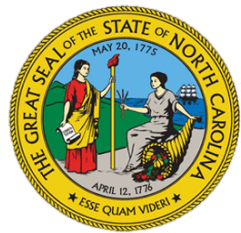# North Carolina COVID-19 Vaccine Management System

CVMS Organization Portal User Guide

Version 2

February 26, 2021

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the Provider & Organization Contact Center at (877) 873-6247 and select option 8. The Provider & Organization Contact Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET
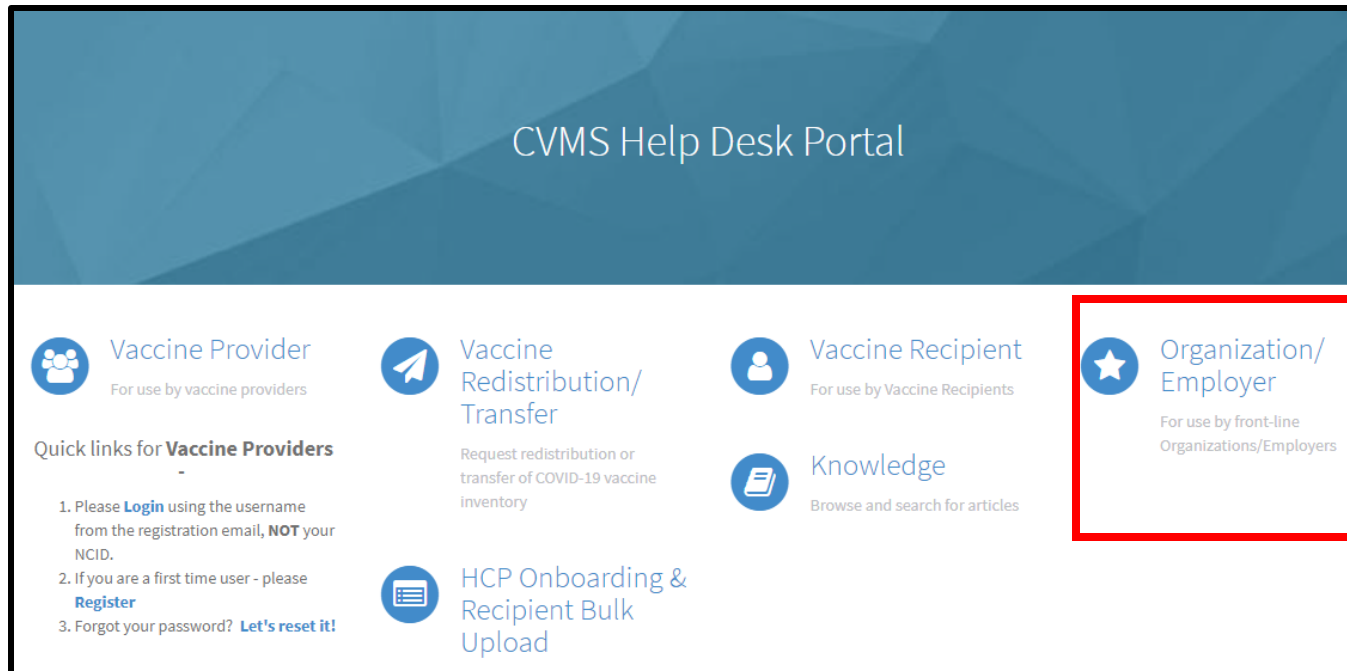
On the home page of the CVMS Help Desk Portal, select the "**Organization/Employer**" option to submit your question, issue, or request.

Table of Contents

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Process Overview

Overview

This guide is intended for frontline workers' organization which are *not* Healthcare Vaccine Providers.

As a frontline workers' organization, you will have the opportunity to upload your eligible recipients into the CVMS Organization Portal so that they can register in the COVID-19 Vaccine Portal prior to receiving the COVID-19 vaccine.
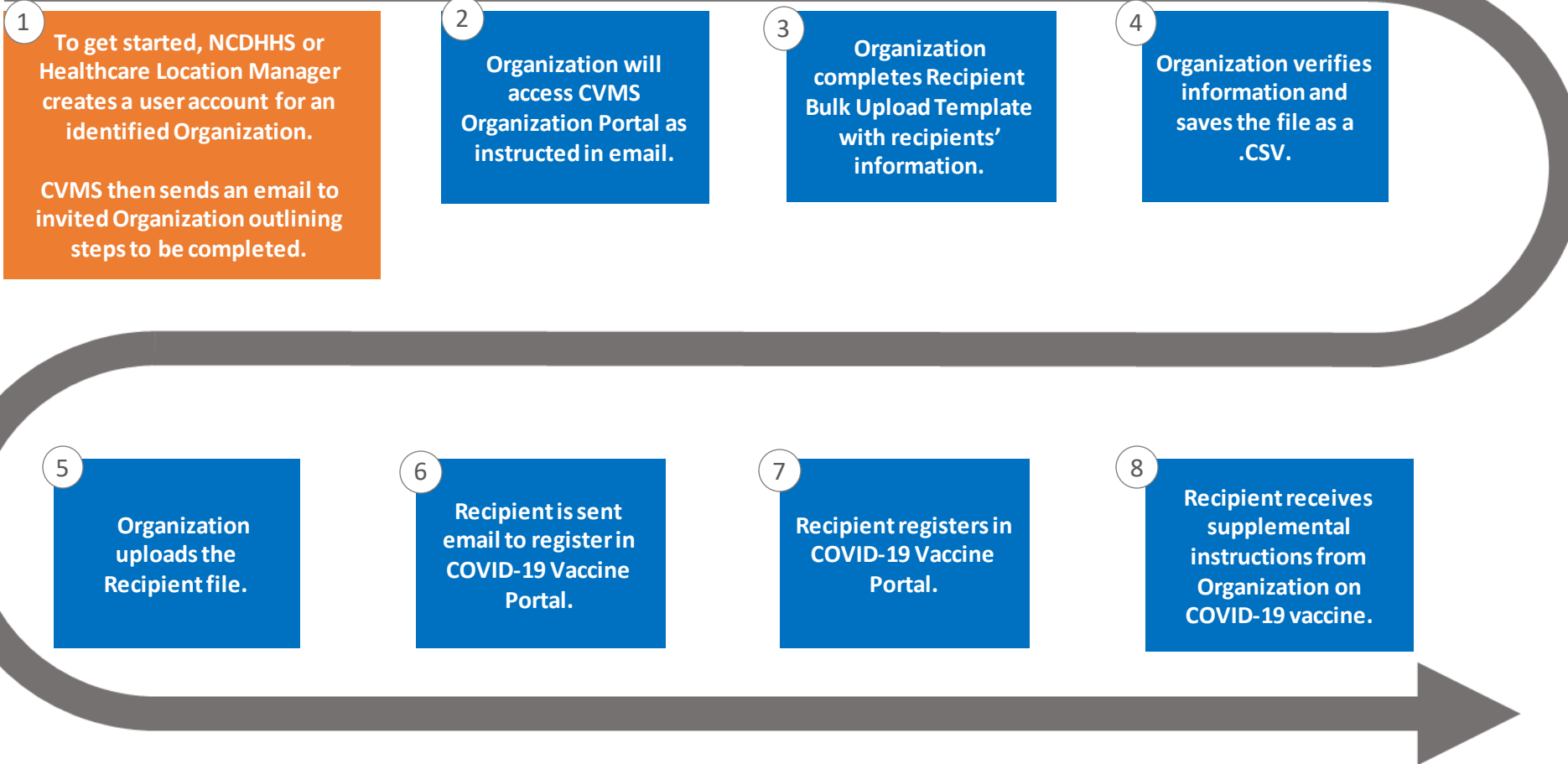
This user guide will focus on four core areas:

1. Completing the Recipient Bulk Upload Template

2. Uploading the Recipient Bulk Upload File to the CVMS Organization Portal

3. Correcting File Errors & Re-uploading

4. Viewing uploaded Recipient records

You will also need to:

- Use the latest version of Chrome, Edge (Chromium only), Firefox, or Safari browsers (Internet Explorer and Edge non-chromium browsers are not supported)

- Use Microsoft Excel to edit the Recipient Bulk Upload Template file (or any equivalent spreadsheet editor)

- Log in the CVMS Organization Portal account at https://covid-vaccine-employer-portal.ncdhhs.gov

Now, let's get started!

Recipient Bulk Upload Registration Process Overview

1 To get started, NCDHHS or Healthcare Location Manager creates a user account for an identified Organization.

CVMS then sends an email to invited Organization outlining steps to be completed.

2 Organization will access CVMS Organization Portal as instructed in email.

3 Organization completes Recipient Bulk Upload Template with recipients' information.

4 Organization verifies information and saves the file as a .CSV.

5 Organization uploads the Recipient file.

6 Recipient is sent email to register in COVID-19 Vaccine Portal.

7 Recipient registers in COVID-19 Vaccine Portal.

**8** Recipient receives supplemental instructions from Organization on COVID-19 vaccine.

Audience

Organization Point of Contact

A COVID-19 Vaccine Portal Account is NOT REQUIRED to receive the COVID-19 vaccine. Recipients may contact a participating COVID-19 vaccinating provider to verify their Eligibility Status and schedule an appointment to receive the COVID-19 vaccine (if eligible).

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Log-In the CVMS Organization Portal
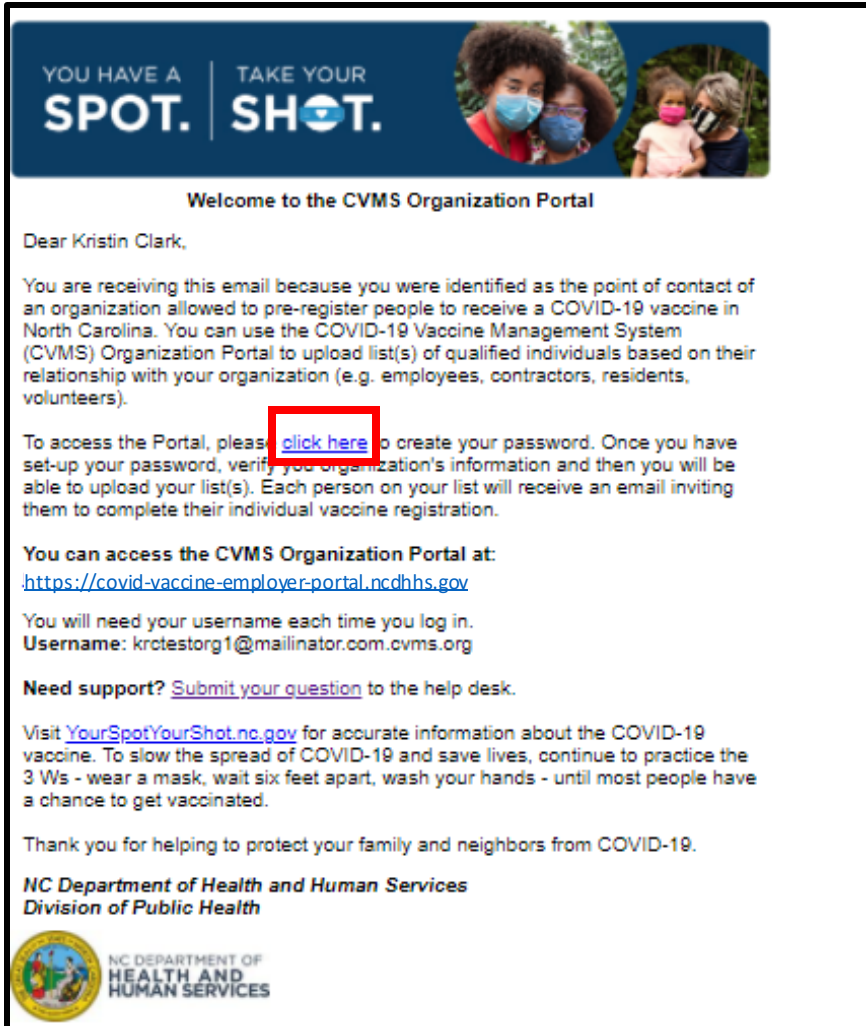
First, the NCDHHS team or a Healthcare Location Manager at any enrolled COVID-19 vaccinating provider (e.g., Local Health Department) will invite your Organization to register.

You will receive an email from nccvms@dhhs.nc.gov inviting you to complete registration in the CVMS Organization Portal.
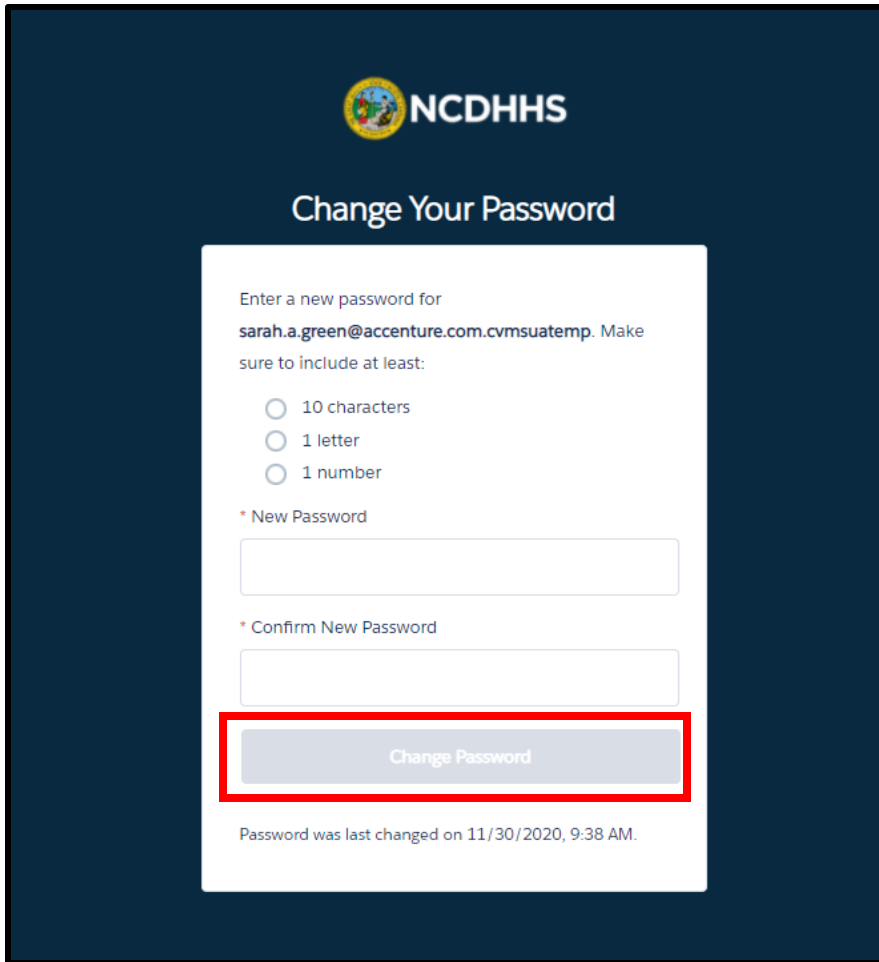
The username included in the email will be your **CVMS ORGANIZATION PORTAL USERNAME**.

1. Click the **HYPERLINK** to reset your password

Audience

| Organization Point of Contact |

Step 2 of 4: Change Password

After clicking the link in the email, you will be prompted to **CHANGE YOUR PASSWORD.**

1. Enter a **NEW PASSWORD**

2. Re-enter the **NEW PASSWORD TO CONFIRM**

3. Click **CHANGE PASSWORD**

After creating the password, you will be automatically logged in to the CVMS Organization Portal.

Audience

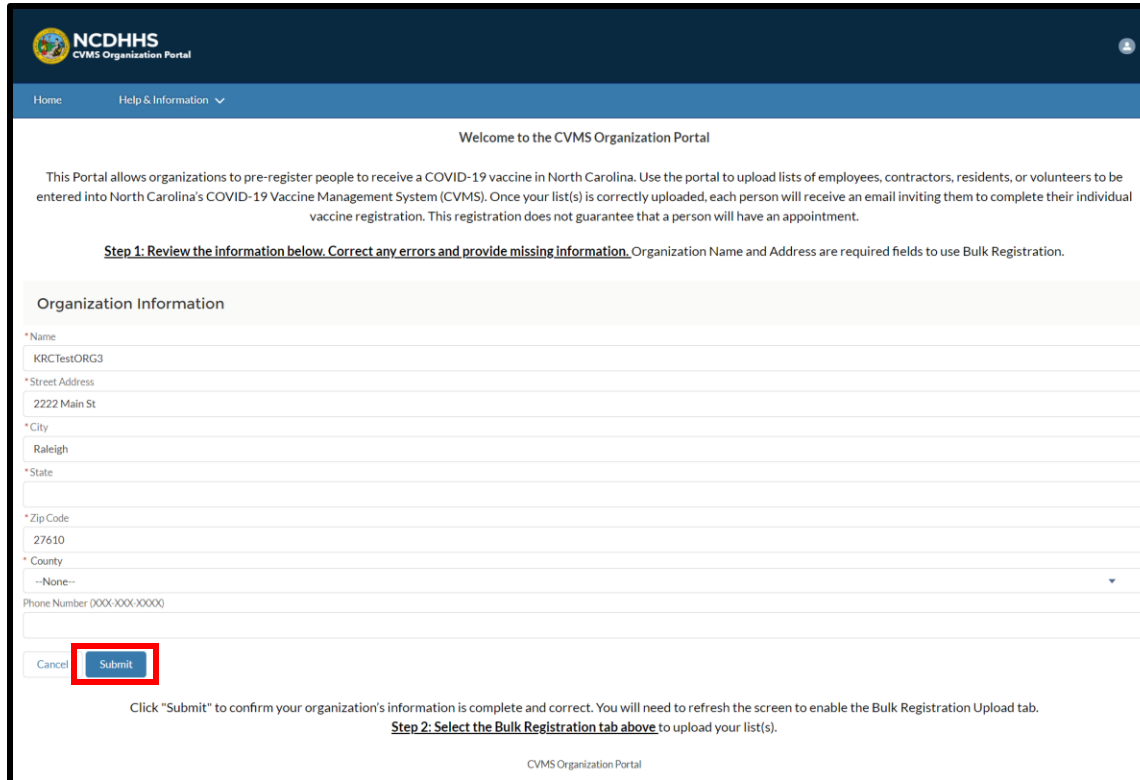Organization Point of Contact

The CVMS Organization Portal Homepage will be the main page for you to complete your required activities.

Before being able to begin the bulk upload process, the Org Point of Contact needs to verify their organization's information. Only after the SUBMIT button is clicked can the **BULK REGISTRATION TAB** be accessed

1. Review and **UPDATE** the different fields

2. Click **SUBMIT**

Audience

Organization Point of Contact

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After submitting your registration details, a new **BULK REGISTRATION** tab will appear in the header.

You may now begin the **RECIPIENT BULK UPLOAD PROCESS** to invite your recipients to register for the covid-19 vaccine in CVMS. Having recipients pre-registering in CVMS prior receiving the vaccine will significantly shorten the process the providers have to go through the day of their vaccination.

Audience

Organization Point of Contact

Prepare the Recipient Bulk Upload File

Step 1 of 4: Download the Recipient Bulk Upload Template

After clicking the Bulk Registration tab, you will click the link in STEP1 to download the bulk registration upload Excel template.

1. Click on the **Bulk Registration** tab

2. Click the phrase **Download the Bulk Registration Upload Excel template**

   Note: If the following error message appears, please click on **OK:**
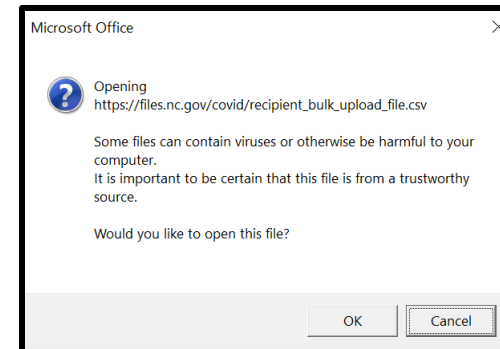
3. When the file is downloaded, **OPEN IT** in Excel

Tips

The template is also posted on the DHHS website at: https://files.nc.gov/covid/recipient_bulk_upload_file.csv

In general, downloaded files are automatically saved in the Downloads folder. This folder is usually located on the drive where Windows is installed (for example, C:\users\your name\downloads).

Audience

Organization Point of Contact

1. Open the **RECIPIENT BULK UPLOAD** file in Excel

2. If an alert message on the file format appears, click "Yes" to confirm you wish to open the file
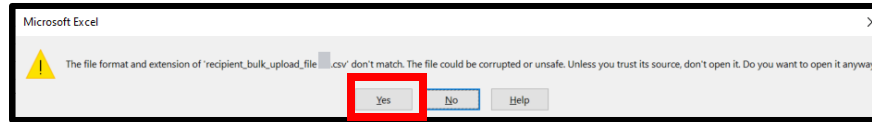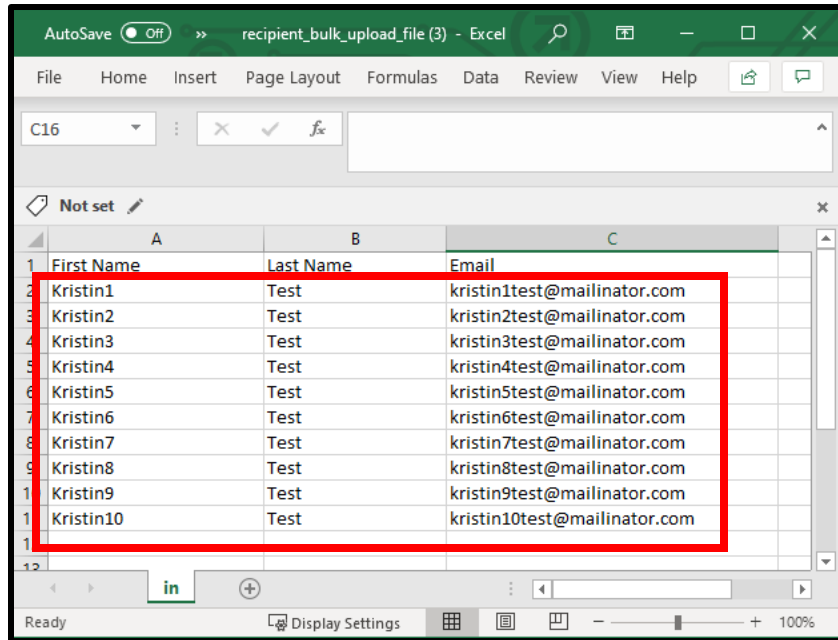
3. In Excel at the top of the file, click on **ENABLE EDITING** to be allowed to enter data

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Step 3 of 4: Add Recipients Data to Bulk Upload Template

To begin the Recipient Bulk Upload process, you will need to collect information on your Recipients. Ensure that legal names and real email addresses are captured. Please do not enter more than 5,000 recipients in the file. If you need to enter more than 5,000 recipients, please create a second file. You can upload as many files as needed.

Audience

Organization Point of Contact

1. Enter the following information in the file:

   - First Name

   - Last Name

   - Email Address

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After verifying that all data has been accurately entered into the Excel file, you can **SAVE THE FILE AS A .CSV FILE**.

By default, Excel will change the file format to an .xls Excel file. Please change file format back to a .CSV file.

Audience

Organization Point of Contact

1. Click the **FILE** button

2. Click **SAVE AS**

Tips

Depending on the spreadsheet application and version installed on your computer, differences in that process may apply.
Regardless of those differences, save the file as a .csv file.
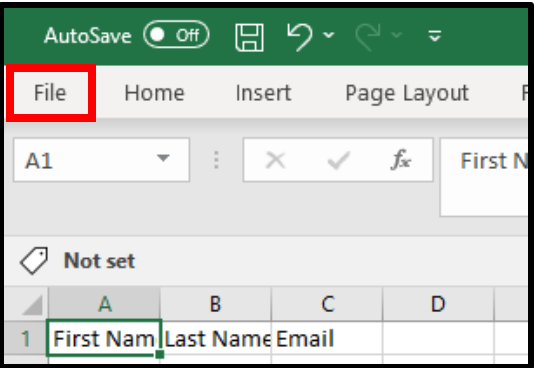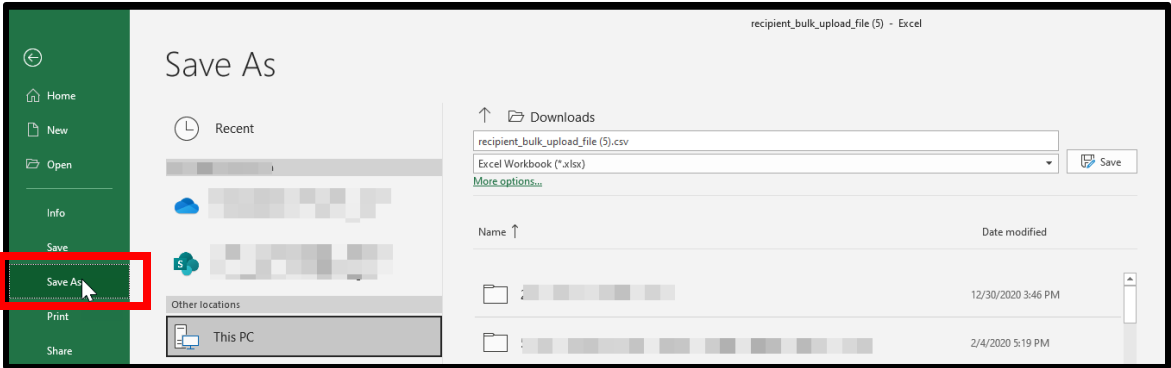
3. Enter a **FILE NAME** (no name requirement)
4. Select the file type **CSV (comma-delimited) (*.csv)**

5. Click **SAVE**

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Option 1 - Upload 100 or Fewer Recipient Records at a Time (Low Volume)

Step 1 of 4: Select the Low Volume tab for 100 or fewer records

We recommend using this method if possible since it will be faster. If you have several hundred recipients, you can create 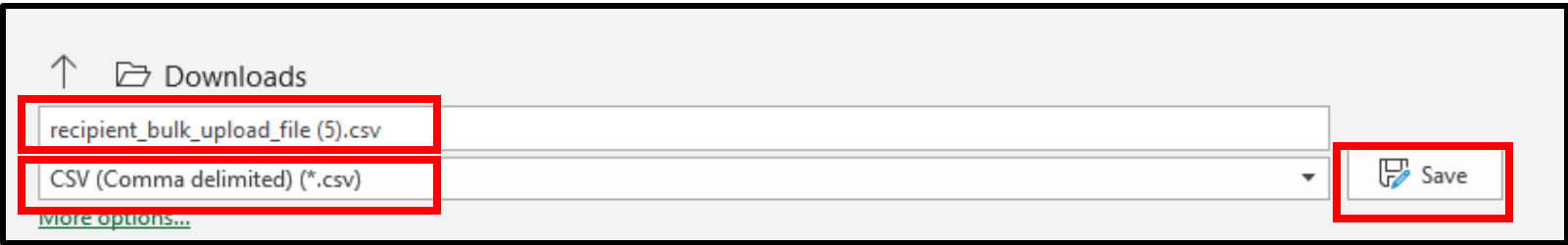multiple files of 100 or fewer recipients to upload individually. Each file will need to contain 100 or fewer recipients to upload.

1. At the top of your Homepage, navigate to the **BULK REGISTRATION** screen

2. Select the **LOW VOLUME** tab

Audience

Organization Point of Contact

Tips

The Recipient Bulk Upload File should be saved as a .CSV file.

You may repeat this process multiple times in groups of 100 or less recipients.
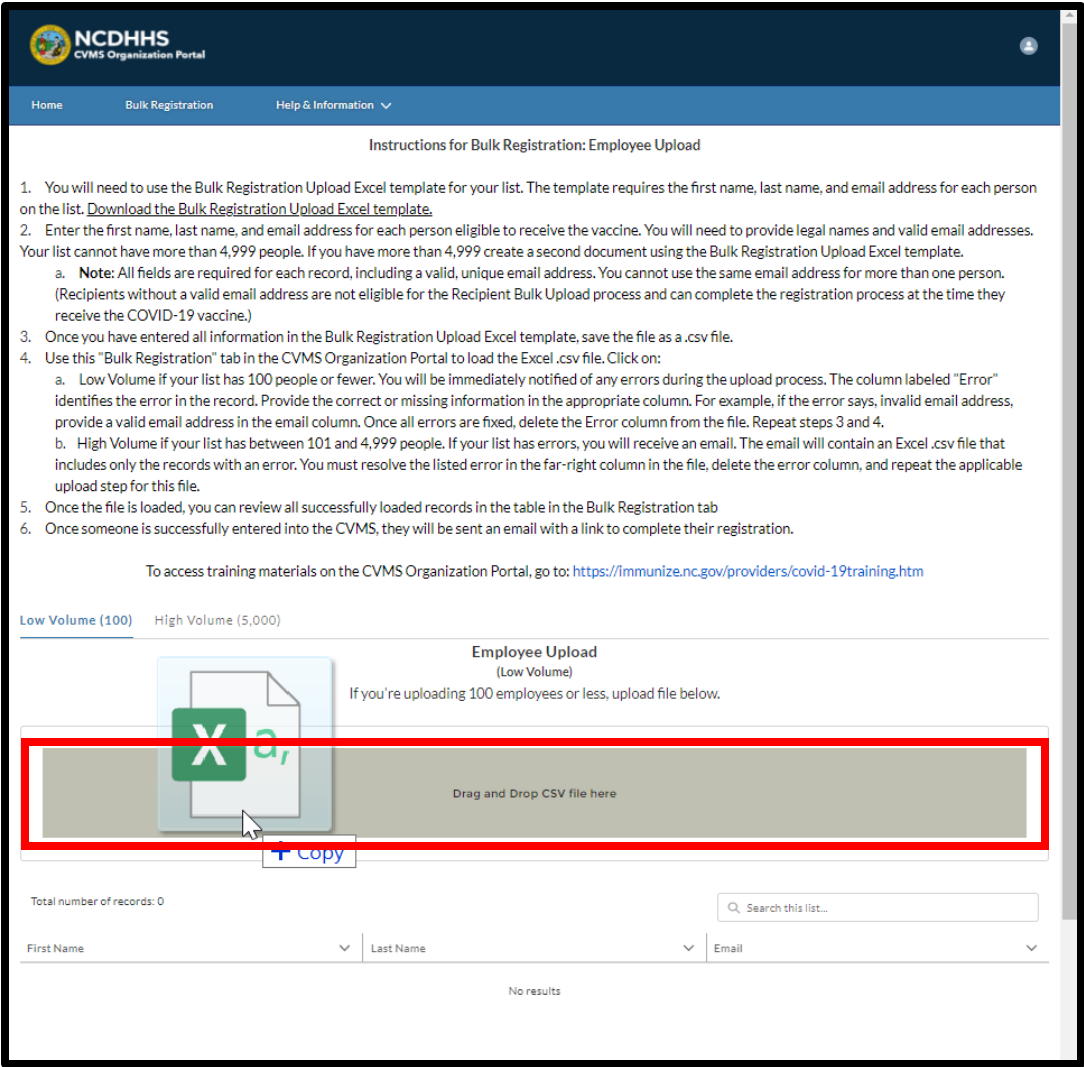
When you upload your Recipient Bulk Upload File using the Low Volume tab, you will be able to review your data before creating the records.

1. Drag and drop your file to the **DRAG AND DROP CSV FILE HERE** area

2. After you dropped the file, you will see the content of the file appear in the table below the **DRAG AND DROP CSV File** area

Audience

Organization Point of Contact

Tips

Remember, you can only upload a maximum of 100 recipient records at a time using the Low Volume tab.

For instructions on using the High-Volume tab, skip to the next section of this User Guide.

1. **REVIEW** the uploaded data

2. If you find errors or missing information, click **CANCEL**

   - *Clicking **CANCEL** removes the file*

3. If the data looks correct, click the **CREATE RECORDS** button

Audience

Organization Point of Contact

Step 4 of 4: Review Successful and Failed Record Alert Message

After creating the records using the **LOW VOLUME TAB**, you will see an **ALERT MESSAGE** appear. The message will state the number of **SUCCESSFUL** recipient records uploaded and the number of recipient records that **FAILED** to be uploaded.

Once you click **OK**, the recipients who were successfully loaded will be sent **AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** to the **COVID-19 Vaccine Portal.**

*We will cover how to manage **FAILED RECIPIENT UPLOADS** in the **VIEW AND RE-UPLOAD FILE SECTION.***
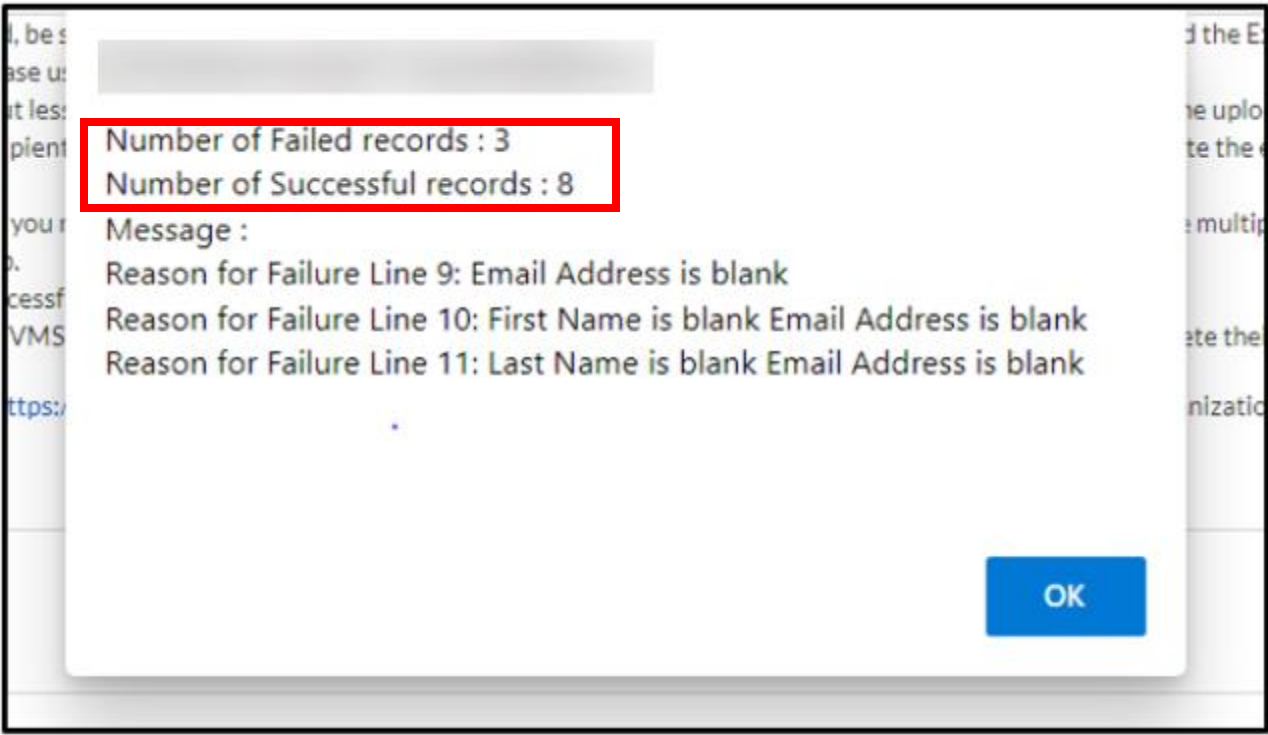
Audience

Organization Point of Contact

Tips

You can view all uploaded recipients in the CVMS Organization Portal, whether they were uploaded through the Low Volume or High-Volume tab.

Option 2 - Upload More than 100 Recipient Records at a Time (High Volume)

Step 1 of 4: Select the High-Volume tab for more than 100 records

If you have a significant number of recipients to upload at once (over 100 recipients, but less than 5,000 recipients), you will need to use the High-Volume process.

1. Click the **HIGH-VOLUME TAB**

2. Click **UPLOAD FILE** and select the prepared Bulk Recipient Upload file **FROM YOUR DESKTOP**

or **DRAG AND DROP THE FILE** unto the page

Audience

Organization Point of Contact

Unlike the low volume process, the contents of your file will not appear on the screen prior to completion of your file's upload.

It is also worth noting that larger files will take longer to upload. While CVMS processes your upload, you will be able to leave the page and it will continue processing in the background.

1. Click **DONE** once the upload is complete
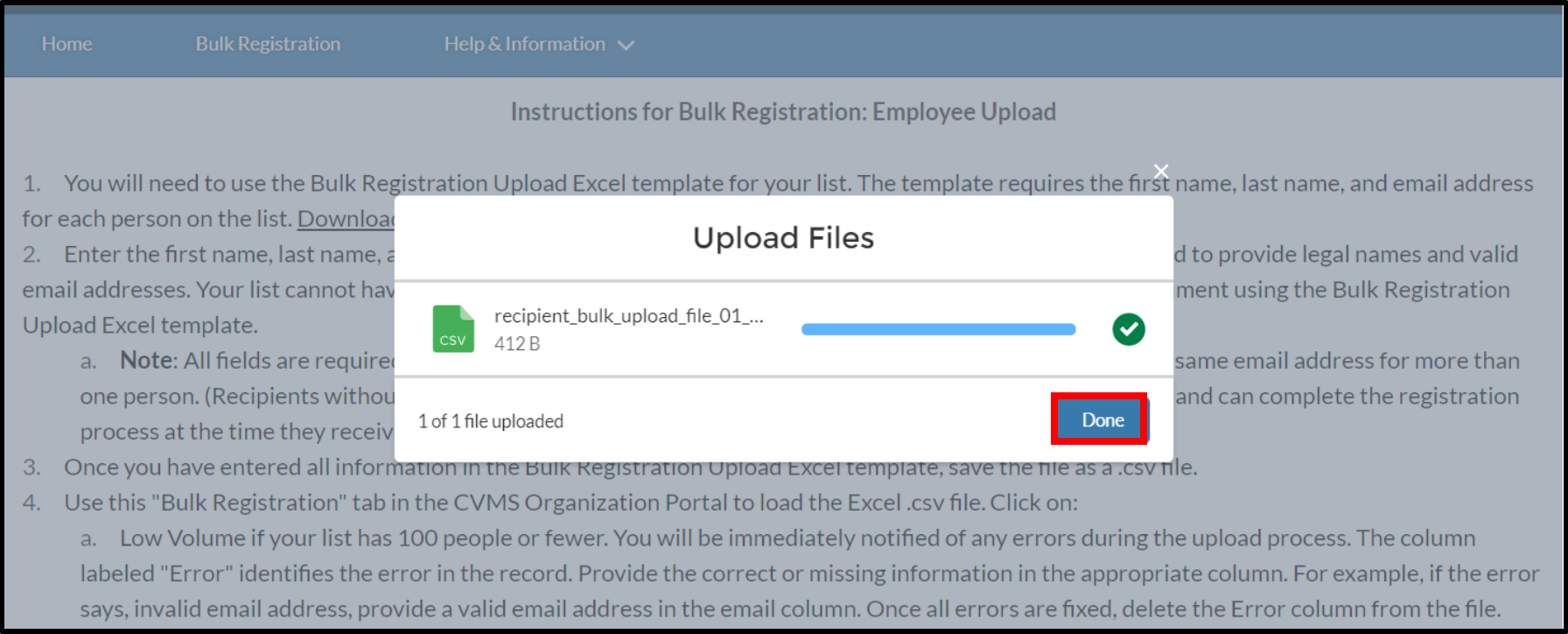
Audience

Organization Point of Contact

Tips

This process may take up to 30 minutes to complete for larger files.

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Once your file is successfully uploaded, you will see a **SUCCESS BANNER** appear at the top of the page. You will also receive an automatic email notification.

If all your recipient records were successfully created, you will receive an email notification with the number of successfully created records.

Successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATION** inviting them to **REGISTER** to the **COVID-19 Vaccine Portal.**

Audience

Organization Point of Contact

Tips

See the next section for how to manage failed recipient uploads.

Step 4 of 4: Failed High Volume Recipient Bulk Upload

If there were any errors in your file upload, you will receive an email notification with a summary of **SUCCESSFUL AND FAILED RECORDS**. In the next section, we will cover how to manage failed recipient uploads.

Only successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** to the **COVID-19 Vaccine Portal.**

Audience

Organization Point of Contact

Tips

See the next section for how to manage failed recipient uploads.

Bulk Employee Upload - Failure

NC CVMS <nccvms@dhhs.nc.gov>
To

BulkError.csv
486 bytes

The Bulk Employee upload file has loaded with errors. Please review below for details of the file. Please review the attachment for the specific lines that failed:

Filename:MKTrocheWITHERRORS
Number of Records In File:1
Number of Records Successfully Loaded: 999
Number of Records Failed:1

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Correct File Errors

Step 1 of 3: Receive Email with Upload File Errors

If any recipient records included in your recipient bulk upload failed to upload, you will **AUTOMATICALLY BE SENT AN EMAIL** from the CVMS Organization Portal.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

1. **OPEN THE EMAIL**

2. **OPEN THE EXCEL ATTACHMENT** in the email

Audience

Organization Point of Contact

Tips

You will be sent an email with any failed, whether you use the Low Volume tab or the High-Volume tab.

Step 2 of 3: Fix File Errors

Inside the attachment will be a list of recipients records that failed to load into the system.

Successfully loaded recipients will <u>not</u> be included in this list.

1. In the Excel file attached to the email, find the column **ERROR**

2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME EXCEL FILE**

	A	B	C		F	G
1	FirstName	LastName	PersonEmail		Error	
2		TestLoadE2ERecip2	Nicholas.NoEmail@company.email2.com		Line 2: First Name is blank	
3	Nicholas		Nicholas.NoEmail@company.email3.com		Line 3: Last Name is blank	
4	Nicholas	TestLoadE2ERecip4			Line 4: Email Address is blank	
5	Nicholas	TestLoadE2ERecip5	bademail		Line 5: Email Address is invalid	

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Step 3 of 3: Save and Re-Upload the Updated Recipient Bulk Upload File

Once you review and correct any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**. If you have less than 100 errors to correct, you can re-upload your file using the Low Volume tab option.

1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**

2. **SAVE** the file as a **.CSV**

3. Navigate to the **BULK REGISTRATION** tab

4. Upload your file using the **LOW VOLUME OR HIGH-VOLUME TAB**

Audience

| Organization Point of Contact |

Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, and Email address.

Fix File Errors – Potential Reasons for Failure

There are a few reasons why a recipient record may fail to be uploaded – from blank fields to invalid data formats.

Potential Error Messages:

1**. EMAIL ADDRESS IS DUPLICATE:**

- Meaning: The email address you attempted to upload was already found in the system. CVMS currently requires a unique email for each recipient, since confidential information can be sent by email address if recipient elects to use email as a channel of communication when they register.

- This error indicates the recipient has already been created through either the CVMS Organization Portal or another means and has already received an invitation to the COVID-19 Vaccine Portal. No further action is required.

2. **FIRST & LAST NAME CANNOT BE EMPTY:**

- Meaning: A name value was not entered

3. **EMAIL CANNOT BE BLANK:**

- Meaning: A email value was not entered

4. **INVALID EMAIL ADDRESS:**

- Meaning: An invalid email address was submitted. CVMS looks for @ sign in email field.

Audience

Organization Point of Contact

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View Uploaded Recipient Records

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View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Organization Portal via the **HOME TAB.**

1. Navigate to the **BULK REGISTRATION TAB**

2. Locate the table of **LOADED RECIPIENTS**

3. You can **SEARCH LOADED RECIPIENTS** by **FIRST NAME AND LAST NAME** in the list view search bar

4. You can also **SORT** by clicking the **COLUMN NAME**

5. A small **ARROW** will appear next to the column name when you sort

Audience

| Organization Point of Contact |

Tips

Remember, all successfully loaded recipients will automatically receive an email allowing access to register to the COVID-19 Vaccine Portal.

You **CANNOT EDIT OR DELETE YOUR LOADED RECIPIENTS.** If you need to remove an uploaded recipient, please go to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine, select **VACCINE RECIPIENT** and submit a request.

Total number of records: 10272

🔍 Search this list...

First Name ↑	Last Name	Email
Albert1	Agatha	albertagatha@mail.com
Alex1	Wilda	alexwilda@mail.com
Alexander1	Veda	alexanderveda@mail.com
Alfred1	Vina	alfredvina@mail.com
Allen1	Albina	allenalbina@mail.com
Andrew1	Sudie	andrewsudie@mail.com
Archie1	Ludie	archieludie@mail.com

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Next Steps for the Uploaded Recipients

COVID-19 Vaccine Portal Email Notification

From: **Vaccine Management System** <nccvms@dhhs.nc.gov>
Date: Thu, Feb 4, 2021 at 6:58 PM
Subject: Welcome to the North Carolina COVID-19 Vaccine Portal
To: nichelle.testing@gmail.com <nichelle.testing@gmail.com>

YOU HAVE A | TAKE YOUR
SPOT. | SHOT.

Welcome to the COVID-19 Vaccine Portal

Dear Recipient TestLast2100,

You are receiving this email because your health care provider or employer pre-registered you to receive a COVID-19 vaccine or you provided your email when you received a COVID-19 vaccine from a North Carolina provider.

To access the COVID-19 Vaccine Portal, please click here to create your password. Once you have set-up your password, you will be able to complete the vaccine registration. After you register, you will see which vaccine group you are in and which groups are currently being vaccinated. You will also be able to receive a reminder to get your second dose and access your vaccine record.

You can access the COVID-19 Vaccine Portal anytime at:
https://covid-vaccine-portal.ncdhhs.gov/

You will need your username each time you log in.
Username: nichelle.testing@gmail.com.covid19vaccine

Need support? Submit your question to the help desk here: Submit Ticket
You may also call the COVID-19 vaccine help center at (888)-675-4567, Monday through Friday from 7 a.m. until 7 p.m., and on Saturday and Sunday from 8 a.m. until 4 p.m.

Visit YourSpotYourShot.nc.gov for accurate information about the COVID-19 vaccine. To slow the spread of COVID-19 and save lives, continue to practice the 3 Ws - wear a mask, wait six feet apart, wash your hands - until most people have a chance to get vaccinated.

Thank you for helping to protect your family and neighbors from COVID-19.

NC Department of Health and Human Services
Division of Public Health

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Once successfully loaded into the CVMS Organization Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:
Vaccine Management System nccvms@dhhs.nc.gov

Email Subject: Welcome to the COVID-19 Vaccine Management System

The email will allow recipients to **REGISTER IN THE COVID-19 Vaccine Portal.**

A COVID-19 Vaccine Portal Account is **NOT REQUIRED** to **RECEIVE A COVID-19 VACCINE.**

If your recipients do not have a valid email address or do not want to register, they may contact any participating COVID-19 vaccinating provider to verify their eligibility and schedule an appointment for a COVID-19 vaccine. They can go to https://covid19.ncdhhs.gov/findyourspot to see a list of vaccinating providers and information on Priority Tiers and Eligibility.

Audience

Recipient

Tips

Inform your recipients to allow incoming emails from nccvms@dhhs.nc.gov.

Their COVID-19 Vaccine Portal username is the email address that was uploaded for them followed by .covid19vaccine.

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COVID-19 Vaccine Portal Password Reset & Username

The email notification will prompt recipients to **RESET THEIR PASSWORD** and will provide their **COVID-19 VACCINE PORTAL USERNAME.**

The COVID-19 Vaccine Portal Username has .**COVID19VACCINE** added to the end of the email address that was uploaded for them. They must use the correct username to be able to sign into the COVID-19 Vaccine Portal.

After registering, recipients will be able to complete the **COVID-19 VACCINE REGISTRATION** and will automatically receive their **COVID-19 VACCINE ELIGIBILITY STATUS**.

Audience

Recipient
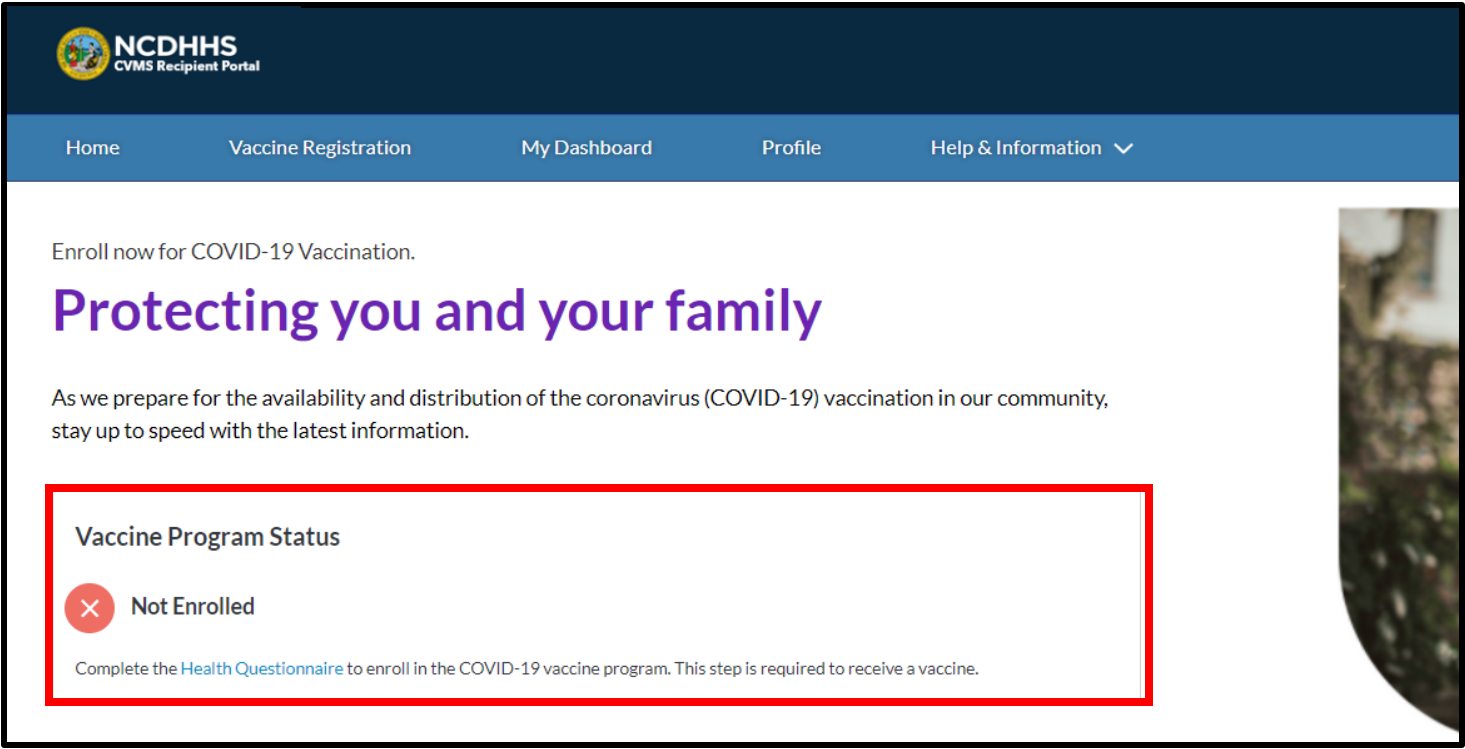
COVID-19 VACCINE PORTAL COVID-19 VACCINE REGISTRATION

Once they log into the **COVID-19 VACCINE PORTAL**, they will be able to complete the **COVID-19 VACCINE REGISTRATION.** The COVID-19 Vaccine Registration asks for **DEMOGRAPHIC DETAILS** as well as a few **MEDICAL DETAILS.** Recipients will receive their **COVID-19 VACCINE ELIGIBILITY STATUS** after submitting the COVID-19 Vaccine Registration.

A recipient's Eligibility Status is determined by the Vaccine Group they fall under as determined by the NC Immunization Branch. Eligibility requirements may be adjusted in the future by the NC Immunization Branch.

Audience

Recipient

Tips

Inform your recipients that they should register using the invitation they were sent by email prior to their first vaccine appointment if possible. This will allow them to check their Eligibility Status, and it should save them time on the day of their first dose appointment.
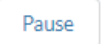
Appendix

Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox or Safari, or Edge (Chromium only) browsers to access CVMS.
- For more details on supported browsers, please see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

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User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	2/11/2021	• Initial Document	-	Nicholas Rinz, Kristin Clark
2	2/26/2021	• Updates to Error Message	31	Nicholas Rinz, Steve DiGangi

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